

**IN THE SUPERIOR COURT OF ARIZONA  
MARICOPA COUNTY**

	)	Case Number: _____
Plaintiff	)	
	)	
	)	
V.	)	<b>Joint Report</b>
	)	<i>(Commercial case)</i>
	)	
	)	
Defendant	)	Assigned to: _____

The parties signing below certify that they have conferred about the matters set forth in Rules 8.1(f) and 16(d), and that this case is not subject to the mandatory arbitration provisions of Rule 72. With regard to matters upon which the parties could not agree, they have set forth their positions separately in item 14 below. The parties are submitting a Proposed Scheduling Order with this Joint Report. Each date in the Joint Report and in the Proposed Scheduling Order includes a calendar month, day, and year.

1. **Brief description of the case:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- If a claimant is seeking other than monetary damages, specify the relief sought: \_\_\_\_\_.
- This is a commercial case under Rule 8.1 because (refer to the specific provisions of Rule 8.1 that apply): \_\_\_\_\_.

2. **Current case status:** Every defendant has been served or dismissed. ☐yes ☐no

- Every party who has not been defaulted has filed a responsive pleading. ☐yes ☐no
- Explanation of a “no” response to either of the above statements: \_\_\_\_\_  
\_\_\_\_\_.

3. **Amendments:** A party anticipates filing an amendment to a pleading that will add a new party to the case. ☐yes ☐no

4. **Special case management:** Special case management procedures are appropriate: ☐ yes ☐ no  
If “yes,” the following case management procedures are appropriate because: \_\_\_\_\_.

5. **Commercial case management [Rule 8.1(f)]:**

The parties have reached agreements regarding electronically stored information (“ESI”) that are appended to this joint report: ☐ yes ☐ no

The parties have prepared a stipulated order regarding ESI, attached hereto: ☐ yes ☐ no

The parties have been unable to agree on areas of disclosure or discovery of ESI, which are described in item 14 below: ☐ yes ☐ no

The parties have reached agreements pursuant to Rule 502 of the Rules of Evidence and submit a proposed order that is attached to this report: ☐ yes ☐ no

The parties have agreed on a proposed protective order, attached hereto: ☐ yes ☐ no

A party has raised an issue concerning claims of privilege or protection of trial preparation materials pursuant to Rule 26.1(f), as further described in item 13 below: ☐ yes ☐ no

6. **Settlement:** The parties agree to engage in settlement discussions with ☐ a settlement judge assigned by the court, or ☐ a private mediator.

The parties will be ready for a settlement conference or a private mediation by \_\_\_\_\_.

If the parties will not engage in a settlement conference or a private mediation, state the reason(s): \_\_\_\_\_.

7. **Readiness:** This case will be ready for trial by \_\_\_\_\_.

8. **Jury:** A trial by jury is demanded. ☐ yes ☐ no

9. **Length of trial:** The estimated length of trial is \_\_\_\_\_ days.

10. **Summary jury:** The parties agree to a summary jury trial. ☐ yes ☐ no

11. **Preference:** This case is entitled to a preference for trial pursuant to the following statute or rule: \_\_\_\_\_.

12. **Special requirements:** ☐ At a pretrial conference or ☐ at trial, a party will require:  
☐ disability accommodations (specify) \_\_\_\_\_  
☐ an interpreter (specify language) \_\_\_\_\_

13. ***Other matters:*** Other matters that the parties wish to bring to the court's attention that may affect management of this case: \_\_\_\_\_.

\_\_\_\_\_  
\_\_\_\_\_.

14. ***Items upon which the parties do not agree:*** The parties were unable in good faith to agree upon the following items, and the position of each party as to each item is as follows:

\_\_\_\_\_  
\_\_\_\_\_.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
For Plaintiff

\_\_\_\_\_  
For Defendant